# Lab 8. Customizing Visualizations

In this lab, we will cover the following topics:

- Dual axis waterfall charts
- Pareto charts
- Bump charts
- Sparkline charts
- Donut charts
- Motion charts

#### Technical requirements

We will use Tableau 2020.x and datasets about potholes, coal emissions, soccer rankings, alien sightings, avocado prices, and snowfall.

## Introduction

We will go beyond **Show Me** and learn techniques to master visualizations in Tableau to make your dashboards stand out. In this recipe, we will cover detailed steps for creating visualizations that convey percentages, based on how a proportion relates to a whole, or how a value changes. The use cases vary from identifying elements in the data that create the biggest impact, creating ranks for different categories over a period of time, or tracking goals for organizations.

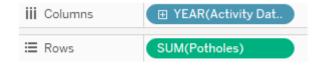
#### Dual axis waterfall chart

Waterfall charts show us how a series of positive or negative changes contribute to a final total. Waterfall charts can also be used to show the composition of a measure with categorical values, resulting in the cumulative amount. The **Dual Axis** waterfall charts illustrate changes more elegantly than color alone.

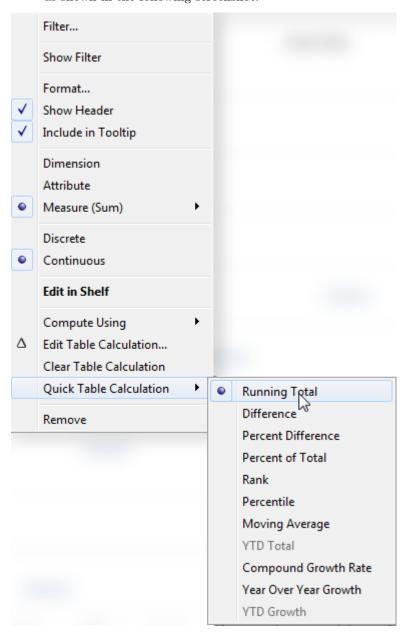
**Getting ready** In this recipe, we will create a dual axis waterfall chart, using a line chart as the base.

**How to do it..** We're using data from the city of Chicago to see how many potholes are identified and how many are fixed. Use Waterfall.tbwx and Potholes.csv to follow along:

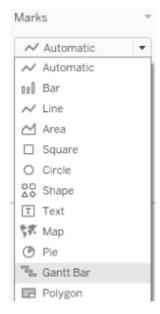
 Create a line or bar chart with one dimension and one measure—Activity Date and Potholes as follows:



2. Apply a Running Total measure under Quick Table Calculation for Potholes, as shown in the following screenshot:



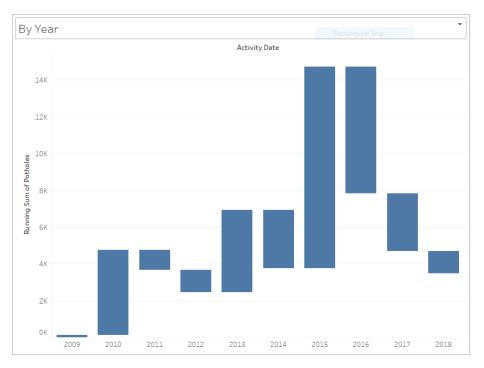
3. Change the Marks type to Gantt Bar, as shown in the following screenshot:



4. Create bars by sizing the mark with a negative version of the same measure. Sizing by a negative version allows the start of each bar to line up with the end of the previous bar. We illustrate one method by applying negative Potholes to Size, as shown in the following screenshot:



5. At this point, we should have a single axis waterfall chart, as follows:



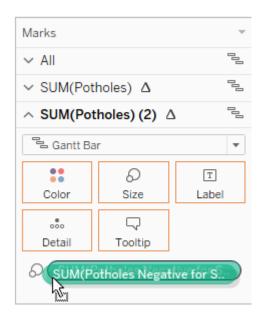
#### Note

Waterfall charts can be used with time and categorical dimensions. The order of the categories can impact the story. Color can be used to show negative and positive values. We can have more options with shapes using a dual axis waterfall chart.

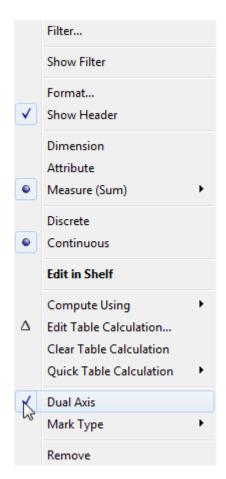
6. Duplicate the pill by pressing the [Ctrl] key and selecting SUM(Potholes) and placing to the right, as shown in the following screenshot:



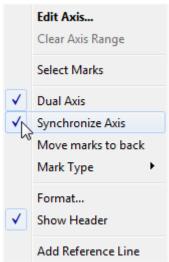
7. Clear the size from the Marks card for the second measure, as shown in the following screenshot:



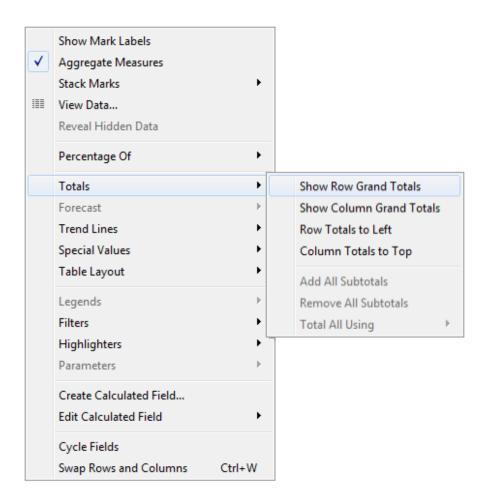
8. Right-click on the second green pill and choose  ${\tt Dual\ Axis},$  as shown in the following screenshot:



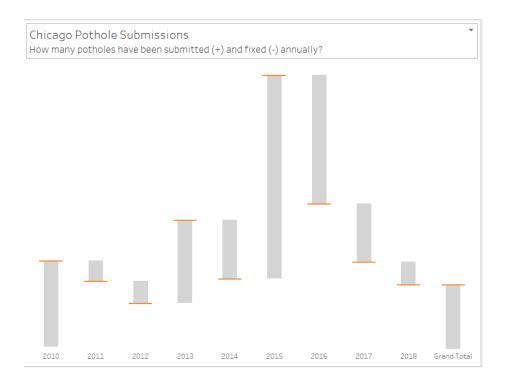
9. Click on the second axis, select Synchronize Axis, and hide the headers, as shown in the following screenshot:



 $10. \ \, {\rm Add} \, {\rm Totals} \, \, {\rm from} \, \, {\rm the} \, \, {\rm Analysis} \, {\rm menu}. \, \, {\rm Navigate} \, \, {\rm to} \, \, {\rm Totals} \, \, | \, {\rm Show} \, \, {\rm Row} \, \, {\rm Grand} \, \, \, {\rm Totals}, \, {\rm as shown} \, {\rm in} \, \, {\rm the} \, {\rm following} \, {\rm screenshot} :$ 



11. In the Marks card, change the default mark or modify the color of the mark based on whether a value is negative or positive. We use Gantt Bar to create lines at the end of each bar, as shown in the following screenshot:



#### How it works...

In  $[step\ 1]$ , we create a line chart with one dimension and one measure and then apply Running Total Table Calculation in  $[step\ 2]$ . In  $[step\ 3]$ , we then change the mark type to Gantt Bar. In order to create bars, in  $[step\ 4]$ , we negate the measure so each column can grow to the previous mark. This creates the stair step effect, so the end of one mark is the beginning of the previous one. We see in  $[step\ 5]$  that we've created a basic waterfall chart.

In order to highlight the positive or negative change, we create a **Dual Axis** chart. In  $[step\ 6]$ , we duplicate the same measure on the **Rows** shelf. We clear the size from the second **Marks** card in  $[step\ 7]$ , which will emphasize the ending value when we make the dual axis in  $[step\ 8]$ —causing the marks to overlay. In  $[step\ 10]$ , we add a total to show the cumulative impact of all values. Finally, in  $[step\ 11]$ , we change the default mark type to **Gantt** Bar to emphasize the negative or positive change.

#### There's more...

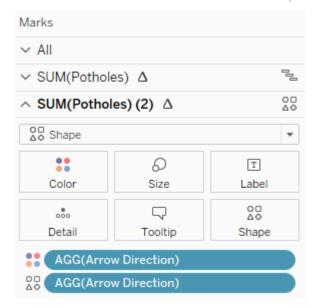
We can also use shapes to indicate positive or negative values by taking the following steps.

1. Create calculations for positive and negative values, as follows:

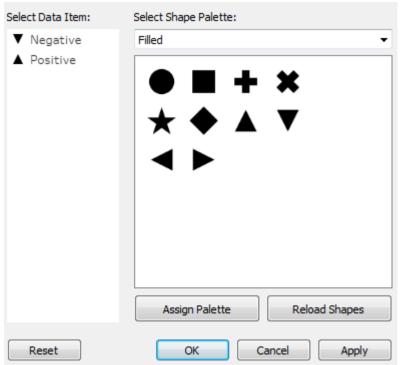
## Arrow Direction

```
If Sum([Potholes]) > 0 THEN 'Positive' ELSE 'Negative' End
```

2. Apply Arrow Direction to Shape (and optionally Color for both SUM(Potholes) and SUM(Potholes) (2), as follows:



3. Click on **Shape**, select **Filled**, and choose the up and down triangles, as follows:



Our final

visualization can be seen in the following screenshot:

Chicago Pothole Submissions
How many potholes have been submitted and fixed annually?



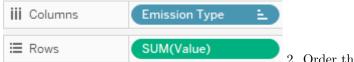
# Pareto chart

Pareto charts are best used when you want to identify the biggest contributing factors to a measurable outcome. They help with identifying priorities and are often used in risk management. The name comes from Vilfredo Pareto, the originator of the 80/20 Rule, or the Pareto Principle, which roughly states that 80% value comes from 20% of a factor. An example would be 80% of sales comes from 20% of our customers.

**Getting ready** In this section, we will use a bar chart with reference lines to create a Pareto chart.

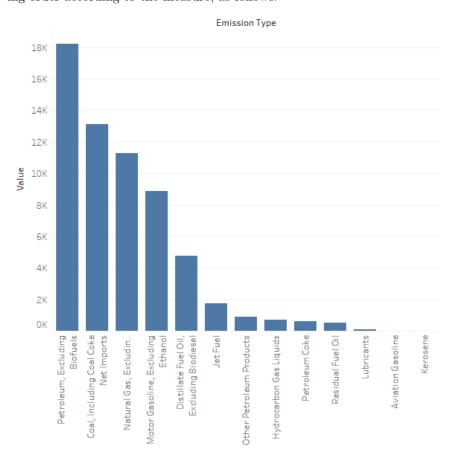
**How to do it..** In this example, we are looking at CO2 emissions data. Open the packaged workbook Pareto.twbx to follow along:

1. Create a bar chart with Emission Type on Columns and Value on Rows, as follows:

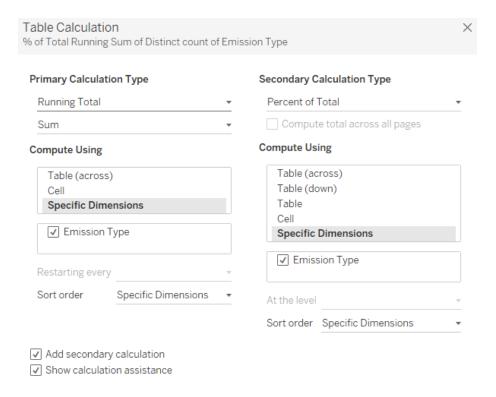


2. Order the chart in descend-

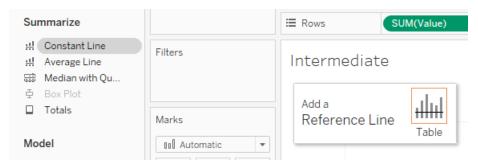
ing order according to the measure, as follows:



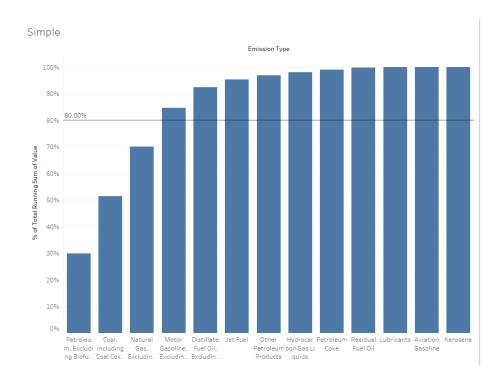
3. Add a primary and secondary table calculation for Running Total and Percent of Total. Modify Compute Using to Specific Dimensions, as depicted in the following screenshot:



4. Add a Reference Line at 80%, as follows:



In the following screenshot, we can see our basic  ${\tt Pareto}$  chart:



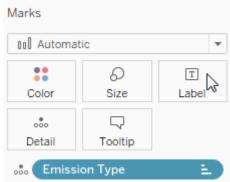
## How it works...

In  $[step\ 1]$  and  $[step\ 2]$ , we create a bar chart using one dimension and one measure sorted in descending order. For  $[step\ 3]$ , we apply the Running Total and Percent of Total Table Calculation. In  $[step\ 4]$ , we use reference lines at 80% and a simple bar chart to allow us to see what categories have the biggest impact.

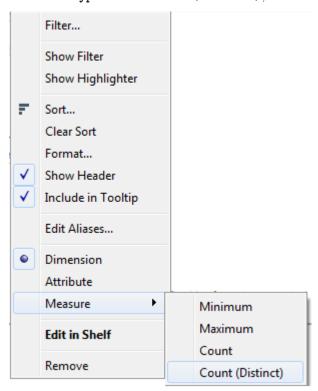
#### There's more...

We can also create a more advanced version of the Pareto chart that shows the actual 80% and 20% values. We can start with the simple version created in the previous steps, and use the advanced worksheet to see the end product, by taking the following steps.

1. Add Emission Type to the Detail section of the Marks card. We do this because our table calculation for Sum(Value) is referencing a specific dimension Emission Type, as follows:

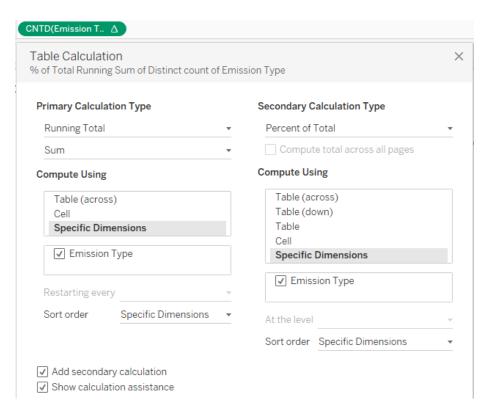


 $2. \quad \text{On the Columns} \ \, \text{shelf, modify} \\ \textbf{Emission Type to be a Count (Distinct), as follows:}$ 

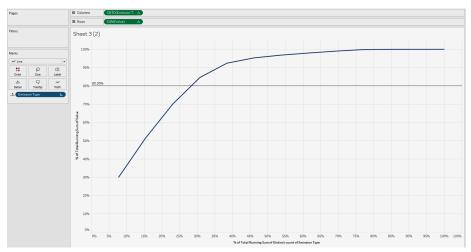


3. Apply the Running

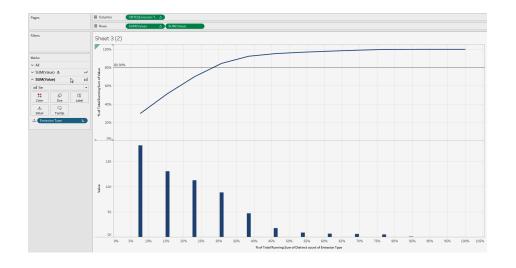
Total and Percent of Total table calculation to it, as follows:



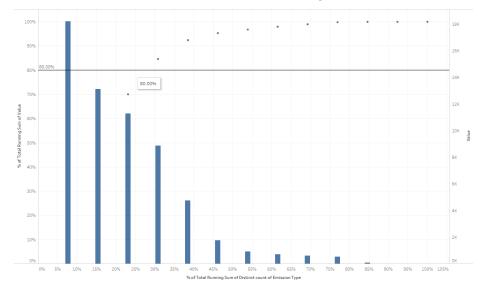
4. Change the Mark type to Line, as follows:



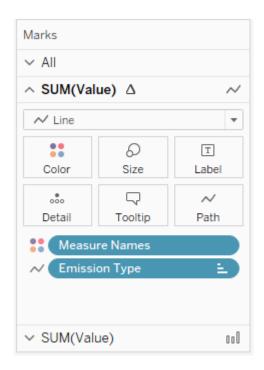
5. Add value to Rows to begin making a Dual Axis chart and change the mark type to Bar, as follows:



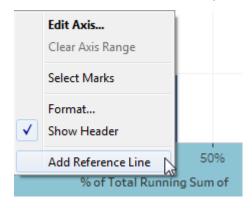
6. When you switch the newly placed green pill to dual axis, it'll change the line chart to a scatter plot as a result of having essentially a measure in the columns and rows, as shown in the following screenshot:



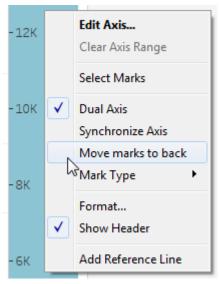
7. Change the dots to a continuous line, and move Emission Type to Path. Make sure you are doing this for the first green pill, as follows:



8. Add a reference line for 20%, as follows:

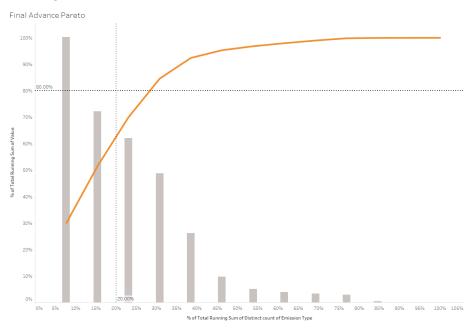


9. Right-click on the axis and select the option Move marks to back, which allows the reference lines to sit on top of the visualizations, as follows:



After some cleanup, it should look like the

## following screenshot:



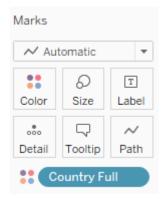
# Bump chart

We will use the bump chart to compare two dimensions against each other using a single value of measurement. They are great for examining rank changes.

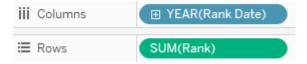
**Getting ready** For the bump chart recipe, we will use a line chart with the rank table calculation.

How to do it.. In this example, we are ranking the teams of the South American Soccer Confederation. Use the Bump Chart.twbx workbook to follow along:

1. Since we want to color our visualization lines by country, put Country Full on [\*\*\*\*Color\*\*\*\*], as follows:

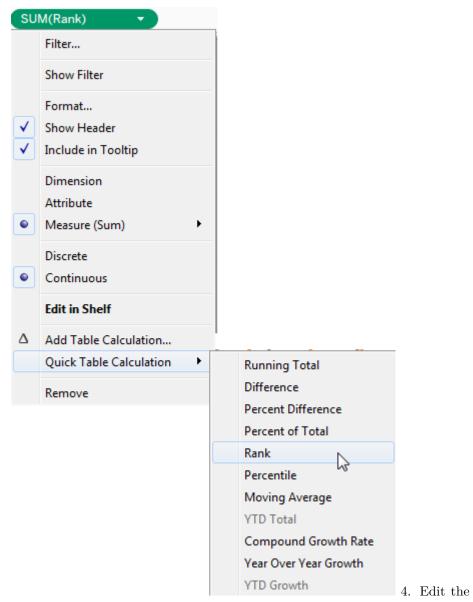


2. Add Rank Date and Rank to the Columns and Rows shelves. Set Rank Date to Year and Rank to Sum, as follows:

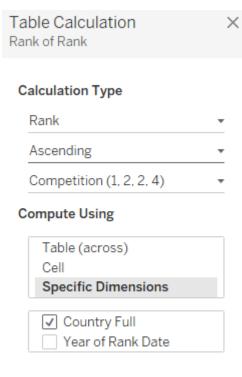


3. Rank in our current

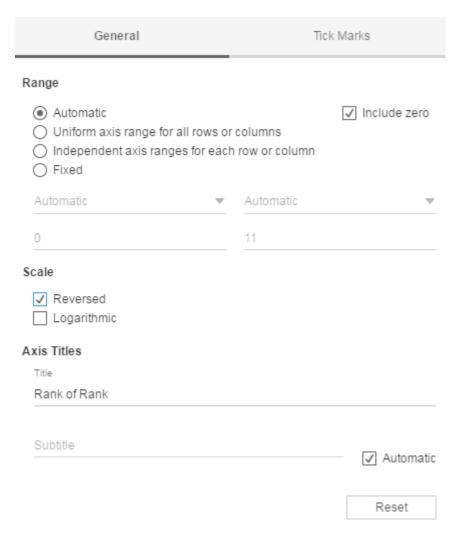
dataset is the actual global ranking of each soccer team. Because we want these to show up as 1-10 instead of their country rankings, we apply the Rank Table Calculation to the rank field, as follows:



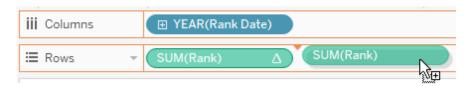
 $\begin{tabular}{ll} \textbf{Table Calculation to Rank in Ascending order, and under Compute Using, select Country Full, as follows:} \end{tabular}$ 



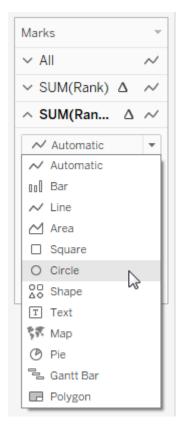
- ✓ Show calculation assistance
- 5. Reverse the axis of rank so our top performer is first, as follows:



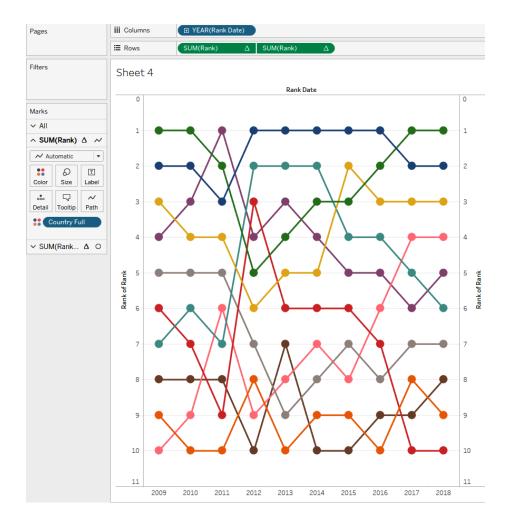
6. Duplicate Rank on the Rows shelf to create the dot points in our visualization, and make this a dual axis by right-clicking and choosing the option, as follows:



7. Change the default mark for the second rank to Circle, as follows:



- 8. Reverse the axis.
- 9. We now have a basic bump chart, which we can see in the following screenshot:



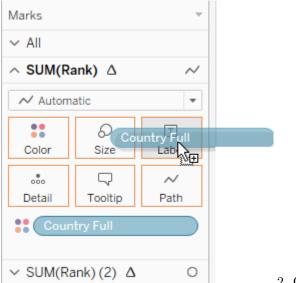
## How it works...

In  $[step\ 1]$ , we put Country Full on Color in the Marks card, which groups and colors the values by Country. In  $[step\ 2]$ , we use a basic line chart for Rank Date and Rank by putting them on the Columns and Rows shelves. In  $[step\ 3]$  and  $[step\ 4]$ , the rank needs to be modified so that we see a sequential order rather than the rank in the dataset. In order for first place to show at the the top of the chart, we reversed the axis in  $[step\ 5]$ . Next, in  $[step\ 6]$  and  $[step\ 7]$ , we duplicate rank on the Columns shelf and change the Mark type to Circle to emphasize each yearly rank. In  $[step\ 8]$ , we reverse the axis as in  $[step\ 5]$ . In  $[step\ 9]$ , we merge the line (Automatic) and Circle marks by using dual axis, and, after some formatting and size changes, we have a basic bump chart.

#### There's more...

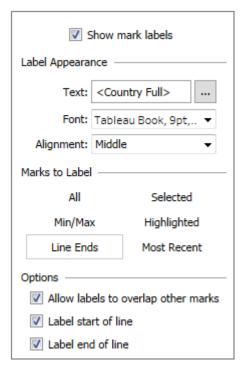
We can label the start and end of the lines by taking the following steps.

 In order to easily see where a country starts and ends in the ranking, label the lines. While in the SUM(Rank) Marks card, move Country Full to Label, as follows:



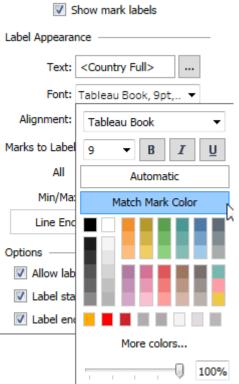
2. Choose Line Ends. You may

need to change the alignment or font sizes, as follows:

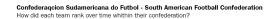


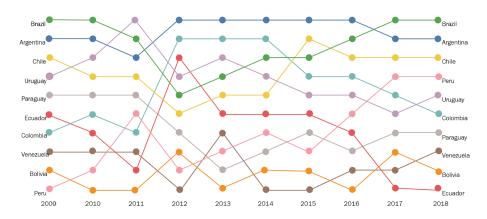
color, as follows:

3. Match the text color with the line



4. After the labels are applied and some additional cleaning up, here is our final chart:





# Sparklines chart

Sparklines are compact visualizations. They show patterns over time and are essentially line charts without the axis. Edward Tufte explains that:

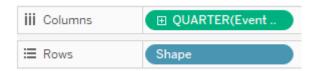
["Sparklines are datawords: data-intense, design-simple, and word-sized graphics."]

In other words, we recognize their form and the information being relayed as easily as we can words on a page—"word-like graphics".

**Getting ready** In order to prepare for the Sparkline recipe, we will need a basic understanding of line charts. In this recipe, we rely heavily on the format lines menu and editing the axis.

**How to do it..** In this section, we use UFO sighting data to make Sparklines. Open the Sparkline packaged workbook to follow along. To follow along, use nuforc\_events.csv and Sparklines.twbx.

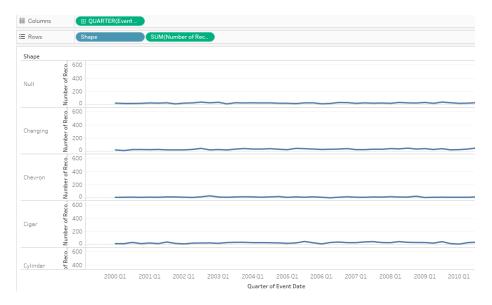
1. To begin, move the event date to **Columns** and shape to **Rows**. Because we have several years of data, we're filtering the dataset to 2010-2016 and displaying quarters, as follows:



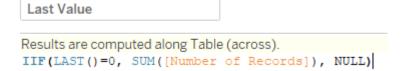
#### Note

We use the green pill for QUARTER(Event Date) as opposed to the blue one because, in this scenario, the date is continuous rather than a discrete value. In other words, we want date to appear as a value on an axis rather than a value to be grouped.

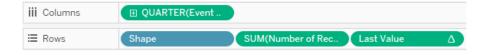
2. Move the measure to the **Rows** shelf. For this dataset, we are using the number of records, as follows:



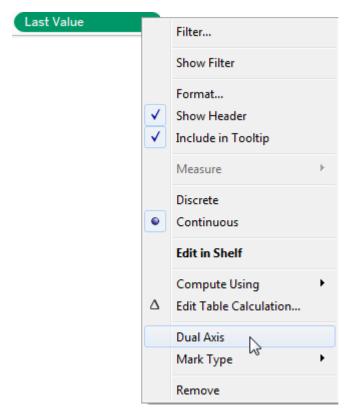
3. Create a measure called Last Value to indicate the final value in the Sparkline, as follows:



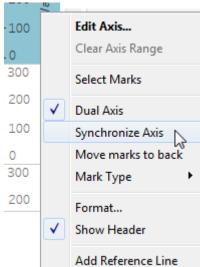
4. Move Last Value to the Rows shelf, as follows:



5. Right-click on Last Value and select Dual Axis, as follows:



6. Right-click on the axis in the visualization and choose Synchronize Axis, as follows:



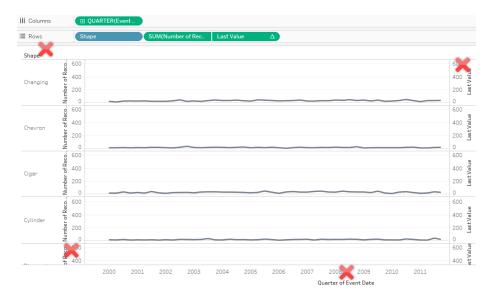
7. Edit the axis by deselecting the **Include** 

Zero option and choosing the Independent axis ranges for each row or

# column radio button, as follows:

General	Tick Marks
Range	
<ul> <li>Automatic</li> <li>Uniform axis range for all rows or columns</li> <li>Independent axis ranges for each row or column</li> <li>Fixed</li> </ul>	
Independent •	Independent ▼
-4	658
Scale  Reversed Logarithmic	
Axis Titles	
Number of Records	
Subtitle	✓ Automatic
	Reset

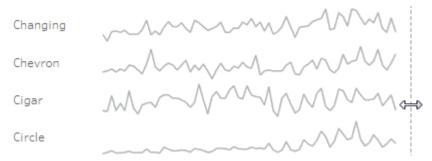
8. Remove all the headers by right-clicking on the visualization where each red x is located and deselecting **Show Header**, as follows:



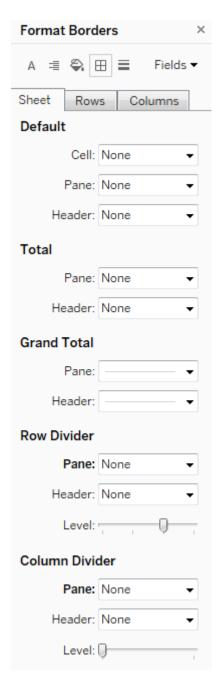
9. Fit the height, as follows:



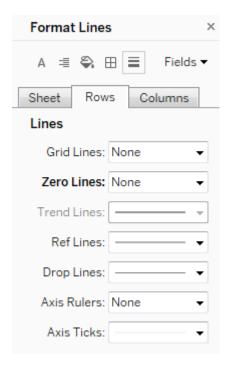
10. Manually resize the width by dragging the column ending inward, as follows:



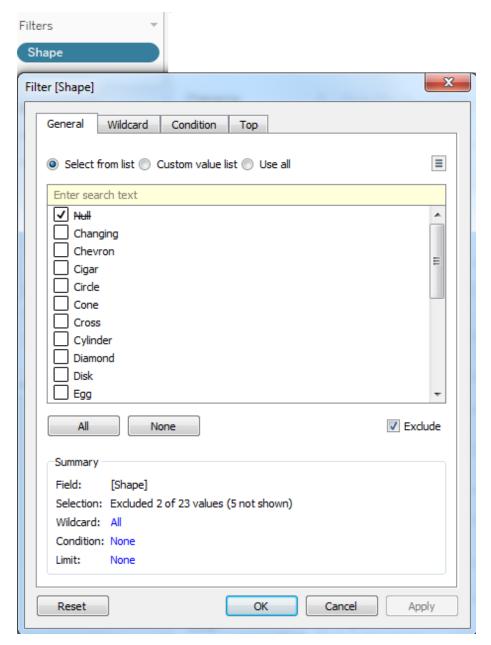
11. Remove all grid lines. From Format Borders, choose Sheet, and set Column Divider and Row Divider Pane to None, as follows:



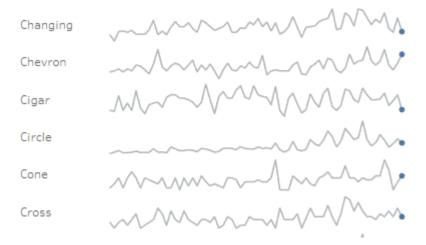
12. From Format Lines, choose Rows, and set Grid Lines and Zero Lines to None, as follows:



13. Exclude null shapes by dragging **Shape** to the **Filters** card and select **Null** and **Exclude**, as follows:



14. The Sparkline chart should appear as follows:



#### How it works...

In  $[step\ 1]$ , we put the event date on the **Columns** shelf and shape on the **Rows** shelf to create a long list of line charts. In  $[step\ 2]$ , we put the number of records on the **Rows** shelf. In order to highlight the final value in the Sparkline, we create a calculation for the final value in  $[step\ 3]$ , put it on the **Rows** shelf in  $[step\ 4]$ , and, in  $[step\ 5]$ , make it a synchronized dual axis chart. Each of the line charts should appear independent so we can see changes for each category relative to itself and not to each other. In  $[step\ 6]$ , we achieve this by editing the axis—excluding zero and making the axis independent for each row or column. In  $[step\ 7]$  to  $[step\ 10]$ , we remove and hide all the headers, all the grid lines, and shrink the width and height considerably. As a result of the formatting, we see the final Sparklines in  $[step\ 11]$ .

#### There's more...

Instead of adding a single color at the end of the Sparkline, we could make one that shows whether the last value is higher or lower than the one before, or even display the maximum values, by taking the following steps.

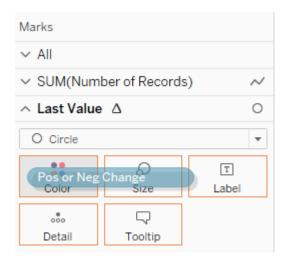
1. In order for the end of line indicator to change color, we need to make the calculation that we can see in the following screenshot:

```
Pos or Neg Change

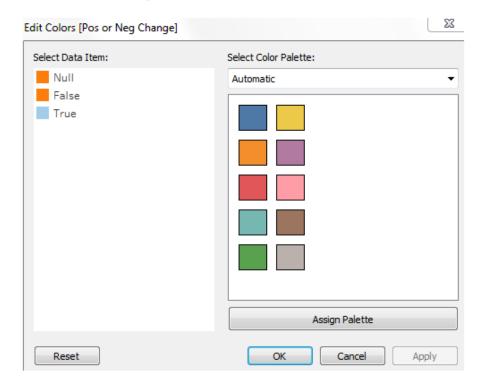
Results are computed along Pane (across then down).

ZN(SUM([Number of Records])) - LOOKUP(ZN(SUM([Number of Records])), -1) < 0
```

2. Move this calculation to the Marks card, as follows:



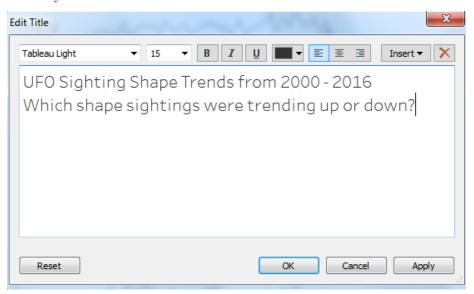
3. Edit the Color option, as follows:



4. Format the title, by right-clicking and choosing Edit Title, as follows:

# Sheet 1 Edit Title... Reset Title Hide Title Format Title...

5. Type in the following text, and modify the size and colors as you would in any text editor:



6. Finalize the formatting by further tweaking the sizes, colors, and transparencies, as follows:

# UFO Sighting Shape Trends from 2000 - 2016 Which shape sightings were trending up or down?



We can also highlight the maximum value instead of the final value.

7. Create the following calculation:

Max Sightings

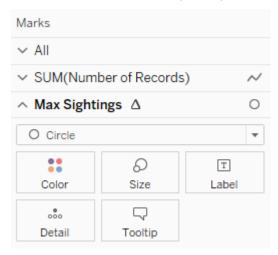
```
Results are computed along Table (across).

IF sum([Number of Records]) = WINDOW_MAX(sum([Number of Records]))
then sum([Number of Records]) END
```

8. Substitute the final value measure with the max sightings one, as follows:

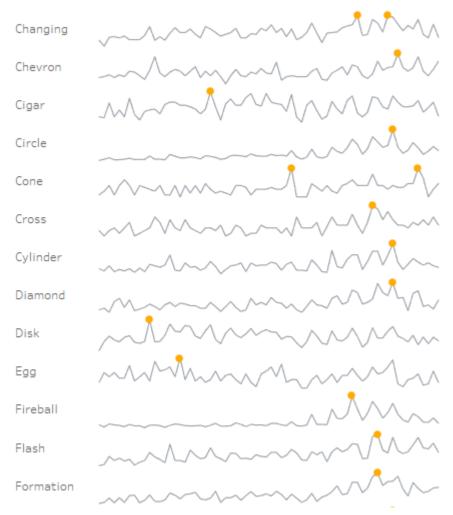


9. Format the color to fit your style, for example:



 $10. \ \mbox{We}$  can see the final Sparkline chart in the following screen shot:

# UFO Sighting Shape Trends from 2000 - 2016 When were the maximum sightings per shape type?



#### See also

• Read any of Edward Tufte's books. He is said to be the creator of the Sparkline.

## Donut chart

Donut charts are pie charts with a hollow center. They are best used when communicating percentages, and can help the distinction of a few categories pop.

## Note

Donuts are best used when there are only a few categories to be displayed in the donut. There are other visualization types that would show many categories better, such as horizontal bars to name but one.

**Getting ready** In this recipe, we extend the pie chart with a dual axis to create a donut chart.

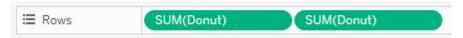
How to do it.. In the next example, we're going to work with avocado data and show which cities eat a higher percentage of organic versus conventional. Use Donut.twbx to work through the example.

 Create a calculation called Donut with zero hardcoded as the value, as follows:

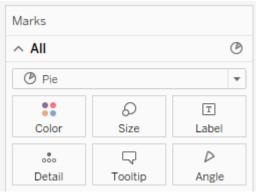


0

2. Place Donut on the Rows shelf twice, as follows:



3. In the Marks card for all values, change the default mark from Automatic to Pie, as follows:

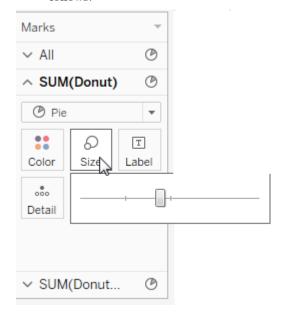


In the following screenshot, we can

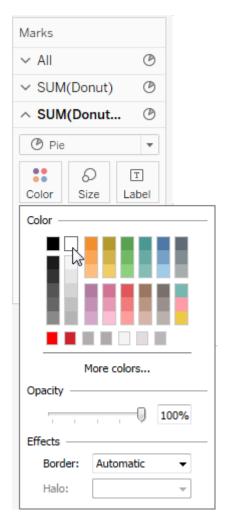
see how our chart should look:



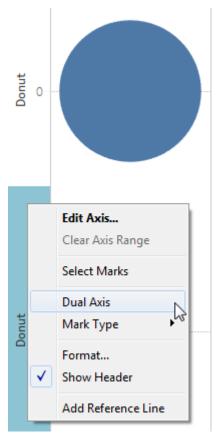
4. Next we will do some basic formatting by making the first donut larger, as follows:



5. Change the color of the second donut to the background color, as follows:



6. Create a dual axis chart by right-clicking on the axis and choosing  ${\tt Dual}$   ${\tt Axis}$ , as follows:



# Note

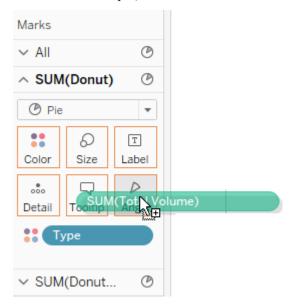
Right-clicking on the second donut pill and choosing **Dual Axis** is an alternative method. At this point in the recipe, we now see a ring, as shown in the following screenshot:



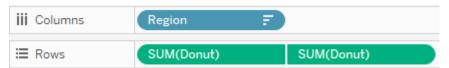
7. In the Marks card for the first donut, move the category you want to display as slices of your pie chart to color. In our example, that's type—organic or conventional. Because we haven't defined the angle, you should see an

even split.

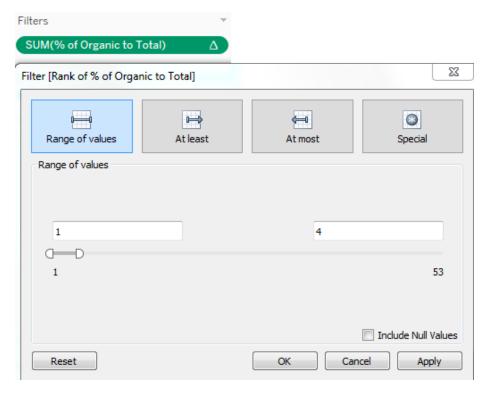
8. Next, we'll define the portion of each slice by moving the measure to Angle. In our example, this will be Total Volume:



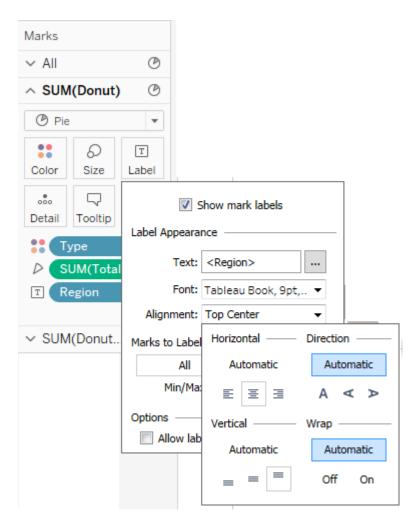
9. To create the horizontal series, put a dimension in the Rows. In our example, this would be Region:



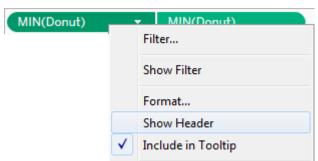
Because we have so many regions, I've also added a top rank filter so we only see a few, as follows:



10. In the Marks card for the first donut chart, move Region to Label and change the alignment to be top and centered, as follows:



11. Remove the axis label, right-click on each donut pill, and deselect Show`Header, as follows:



We can see our donut

chart in the following screenshot:



#### Note

Donuts can be effective and fun when comparing two or three categories. Shy away from this chart type when comparing more.

#### How it works...

In  $[step\ 1]$ , we create a calculation called donut and place it on the Rows shelf twice in  $[step\ 2]$ . In  $[step\ 3]$ , we change the Marks card from Automatic to Pie. In  $[step\ 4]$ , we see that we have two pies. In  $[step\ 5]$ , we modify the format for one pie to be larger than the other pie. In  $[step\ 6]$ , to hollow out the center, the color of the smaller pie is set to match the background. In  $[step\ 7]$ , we create a dual axis chart that overlays the smaller circle onto the larger circle. In  $[step\ 8]$ , we should see a donut chart.

Next, in  $[step\ 9]$ , we create slices of the donut by moving the categorical dimension to **Color** on the **Marks** card (first donut measure). The angle shows how much each slice takes of the whole; in  $[step\ 10]$ , we put **Total Volume** on **Angle**. In  $[step\ 11]$ , we create a series of donuts by placing region on the **Columns** shelf. In  $[step\ 12]$ , we create titles for each donut by moving region onto **Label** within the **Marks** card. We format the text so its alignment is top and center. In  $[step\ 12]$ , we have our final donut chart.

#### There's more...

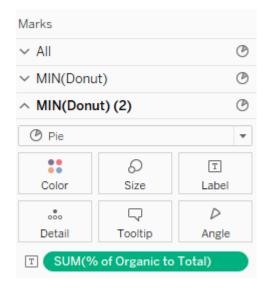
The hole of the donut can be used to display a value like the percent of the total.

1. Create a % of total metric, as follows:

```
% of Organic to Total

{FIXED [Region] : sum(If [Type] = 'organic' then [Total Volume] else 0 end)/sum([Total Volume])}
```

2. Place the % of Organic to Total on to Label in the second donut's Marks card. Format Alignment to be Middle Center and modify the font size and color. Format the decimal places as follows:



The final chart can be seen in the

#### following screenshot:



# **Motion chart**

This section highlights how to use Tableau to page through the data as a movie, frame by frame. Animated charts are useful in showing individual elements, as well as the big picture, in an immersive fashion.

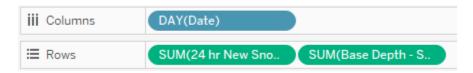
Getting ready In the motion chart recipe, we learn how to use Pages.

How to do it.. In this recipe, we're playing around with snow data for Snowbird, a ski resort in Utah. Open packaged workbook ski fall animation to follow along, ski fall animation.twbx and Snowbird - Utah.csv:

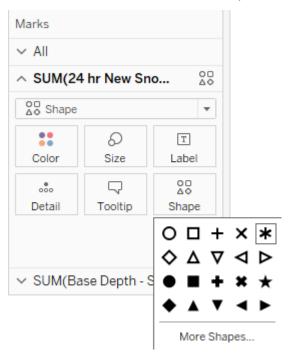
1. Drag a dimension with multiple values to the Pages shelf. In this example, we use YEAR(Date). It works best when you have several values:



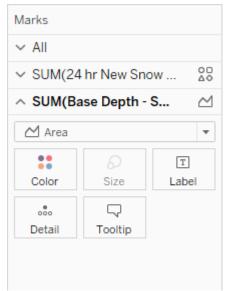
2. Move the date to C``olumns as DAY(Date``) and 24 hour Snow and Base Depth to Rows, as follows:



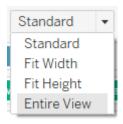
3. Within the 24 hr New Snow- Split 1``Marks card, select Shape instead of Automatic and choose the star, as follows:



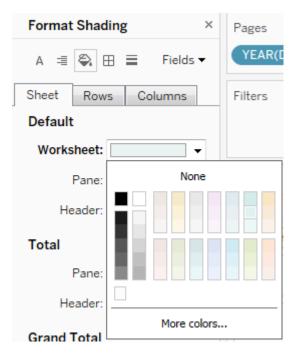
4. Within the Base Depth - Split 1 Marks card, select Area, as follows:



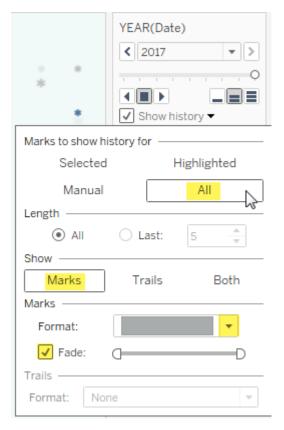
5. Change Fit to Entire View, as follows:



- 6. Remove all axis headers and grid lines.
- 7. Change the background to light blue, as follows:



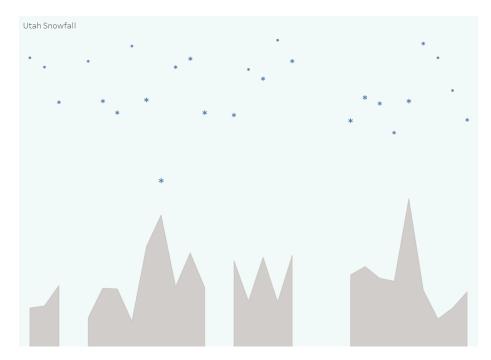
8. Select All and Marks to show all data points. Select the color grey and Fade, to create visual layers, as follows:



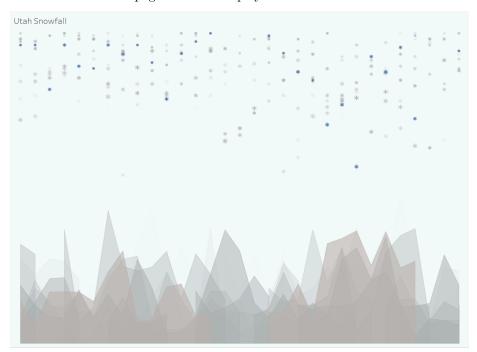
# Note

Make sure to continue using split axis, not dual axis. The lines control the speed. The play and stop buttons are intuitive. The part that makes this visualization fun is the history.

9. Here's the first page after we hit play:



# 10. This is the last page after we hit play:



## How it works...

In  $[step\ 1]$ , we use a time element in the **Pages** shelf to make an animated flip book. The history, illustrated in  $[step\ 3]$ , allows us to show changes in time or position relative to the previous data point. Because we chose to see all marks with fading, we're able to see a layered ghostly effect.

#### There's more...

In order to animate automatically when it is published to the server, you must make an animated GIF. You may check the tutorials for your favorite photo editing tool. Here is an example using GIMP, https://www.digitalcitizen.life/how-create-animated-gif-using-your-own-pictures-gimp. Also, play around with trail marks, which will give different effects.

#### See also

• Please watch any of Hans Rosling's [Ted Talks] videos and check out the Gapminder blogs. These videos are famous and fun. Hans Rosling is credited with being the creator of the motion chart.